MEETING PLANNING ASSISTANCE CHECKLIST

PRE-MEETING PREPARATION

- ❑ Create timeline and checklist
- ❑ Develop, design and distribute meeting promotion and marketing materials
- ❑ Negotiate with hotel for:
    - ❑ meeting rooms
    - ❑ sleeping rooms
    - ❑ audio/visual equipment
    - ❑ food/beverages
- ❑ Find speakers/facilitators
- ❑ Create meeting invitation list
- ❑ E-mail meeting announcement to invitation list
- ❑ Receive and process registration forms
- ❑ Create participant confirmation letter
- ❑ Collect information on speakers/facilitators
- ❑ E-mail or fax participant confirmation letter and travel information sheet
- ❑ Arrange and finalize all catering

FACILITATE RESERVATIONS

- ❑ Send guest rooming list to the hotel

  OR
- ❑ Monitor individual reservation call-in (observing hotel cut-off date for making reservations)

TRAVEL INFORMATION

- ❑ Prepare travel information sheet
    - ❑ Local transportation
    - ❑ Directions/maps

Method of payment for participants travel

- ❑ Self-pay participants

  AND/OR
- ❑ Sponsored event
- ❑ Coordinate participant air travel with designated travel agent

MEETING MATERIALS

- ❑ Create participant name tags
- ❑ Develop training/seminar/conference agenda
- ❑ Provide speaker(s) bio(s)
- ❑ Create final participant roster
    - ❑ Alphabetize by participant last name
    - ❑ Group by jurisdiction/state and alphabetize by participant last name
- ❑ Create participant tent cards, if needed
- ❑ Develop participant meeting evaluation form
- ❑ Assist with collecting meeting materials (printing, binders, packets, local restaurants/sites/ activities, etc.)

DURING MEETING

- ❑ Conduct meeting registration
- ❑ Set up a resource room/display table
- ❑ Approve charges to Master Account on a daily basis
- ❑ Serve as primary hotel liaison/troubleshooter

POST-MEETING

- ❑ Collect participant evaluation forms
- ❑ Return shipment of meeting materials
- ❑ Review final meeting charges
- ❑ Update participant roster

BUDGET	**AMOUNT**
❑ Speakers' expenses and fees	_____
❑ Printing	_____
❑ Supplies (notebooks, name tags, etc.)	_____
❑ Staff hotel per diem	_____
❑ Food/beverages	_____
❑ Audio/visual equipment	_____
❑ Travel (staff and participants)	_____
TOTAL	_____

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